

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

1. Introduction

1.1 Overview

A visa slot management project is a system that is used to track and manage the availability of visa slots, which are appointments that are required for certain visa applications. It might be used by a government agency or a visa processing center to schedule and manage appointments with applicants.

Get your appointment booking calendar online and integrated with your CRM to deliver outstanding customer service for your appointment-based business. Let your clients and staff create, cancel, and reschedule appointments using your live and up to date online or private booking calendar system. Track all your customer contact info, appointments dates and details, payments, and much more using an integrated CRM.

A visa is a travel document that allows you to enter a foreign country for a specific period of time. In most cases, you have to apply for a visa before travelling, either at an embassy, consulate, or online. Sometimes you can also obtain a visa on arrival.

Miscommunication and lack of information transfer are two major time-wasters. When people take time self-learning to do things other team members already know how to do, or work on redundant tasks, you're losing a lot of hours per week. Collaborative CRM tools can streamline your teamwork by letting you build a knowledge base, establish best practice workflows, and allowing for frictionless communication between team members.

All nonimmigrant visa application fee (also known as the MRV fee) payments made on or after October 1, 2022, are valid for 365 days from the date a receipt is issued for payment of the MRV fee. Applicants must schedule an in-person or interview waiver appointment during this 365-day period.

If you are required to provide your biometric information as part of the visa application process you must attend at a visa application centre. When you have completed your on-line visa

application the summary sheet generated by the system will tell you how to book an appointment at a centre that is convenient for you.

A visa is a travel document that allows you to enter a foreign country for a specific period of time. In most cases, you have to apply for a visa before travelling, either at an embassy, consulate, or online. Sometimes you can also obtain a visa on arrival. Firstly, have looked at how agents work.

- Agents collect user credentials to book a visa slot.
- As soon as the visa slots are available, they book them and book for their other client

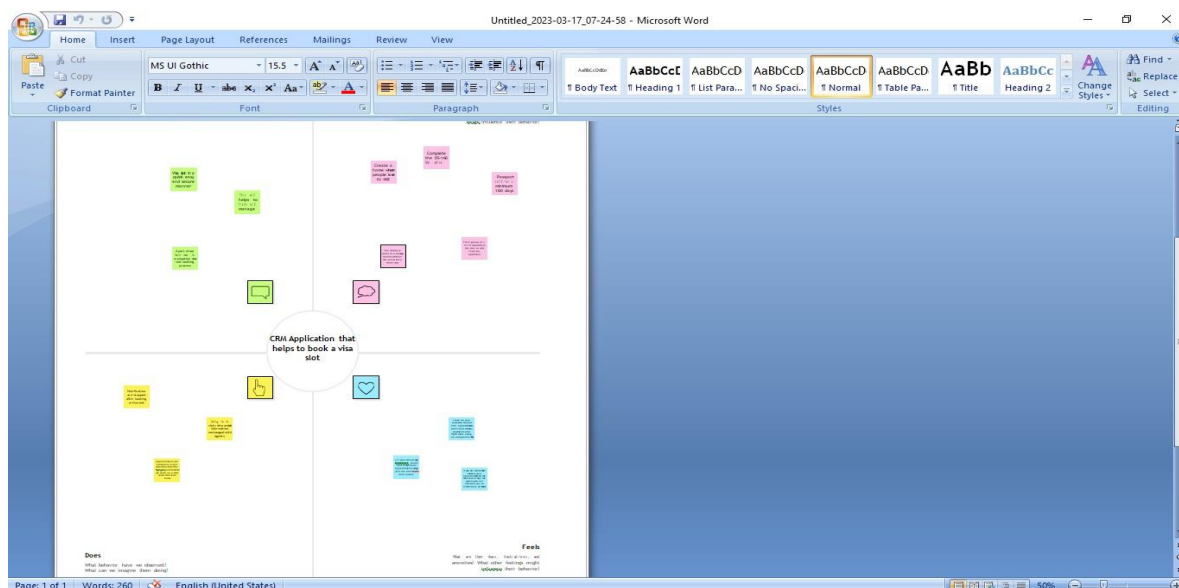
1.2 Purpose

You can book your US embassy visa appointment using your barcode and fee receipt. Once you are done with booking your US student visa appointment, you need to start with an F-1 visa slot booking for the VAC (biometrics: photograph + fingerprint) at least a day before the interview.

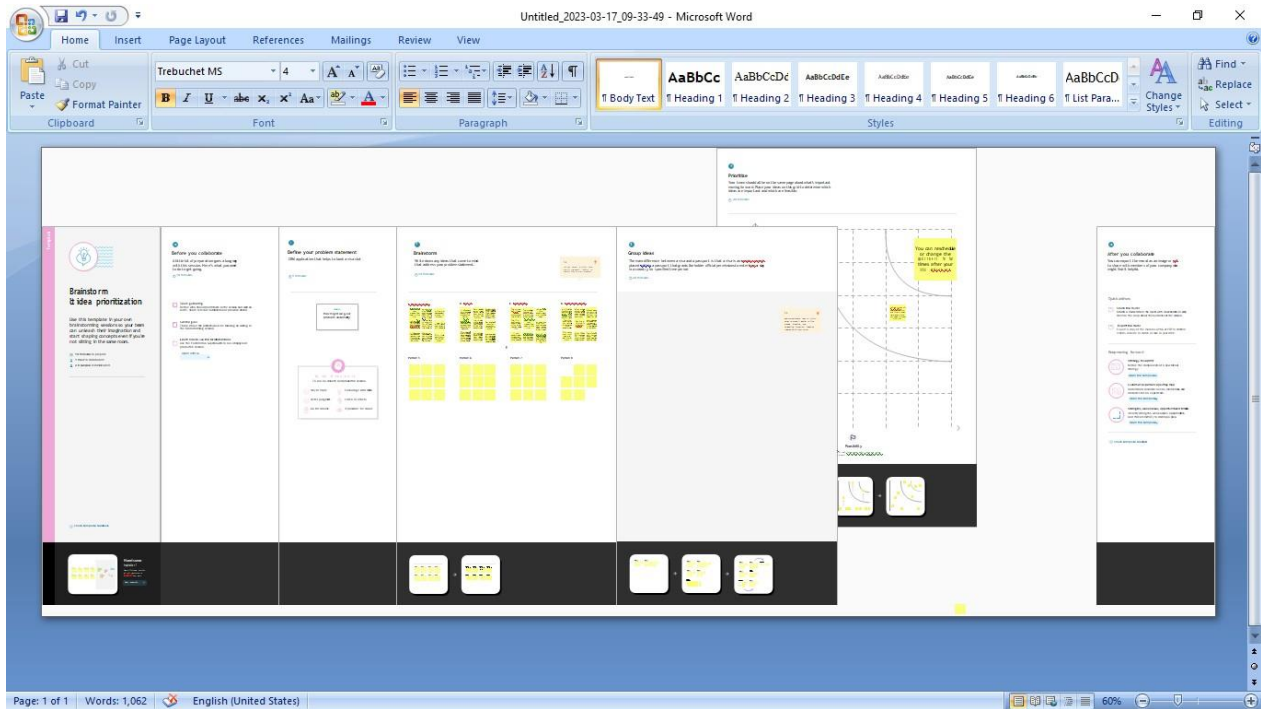
CRM Application that helps to book a Visa Slot. A visa slot management project is a system that is used to track and manage the availability of visa.

2. Problem Definition & Design Thinking

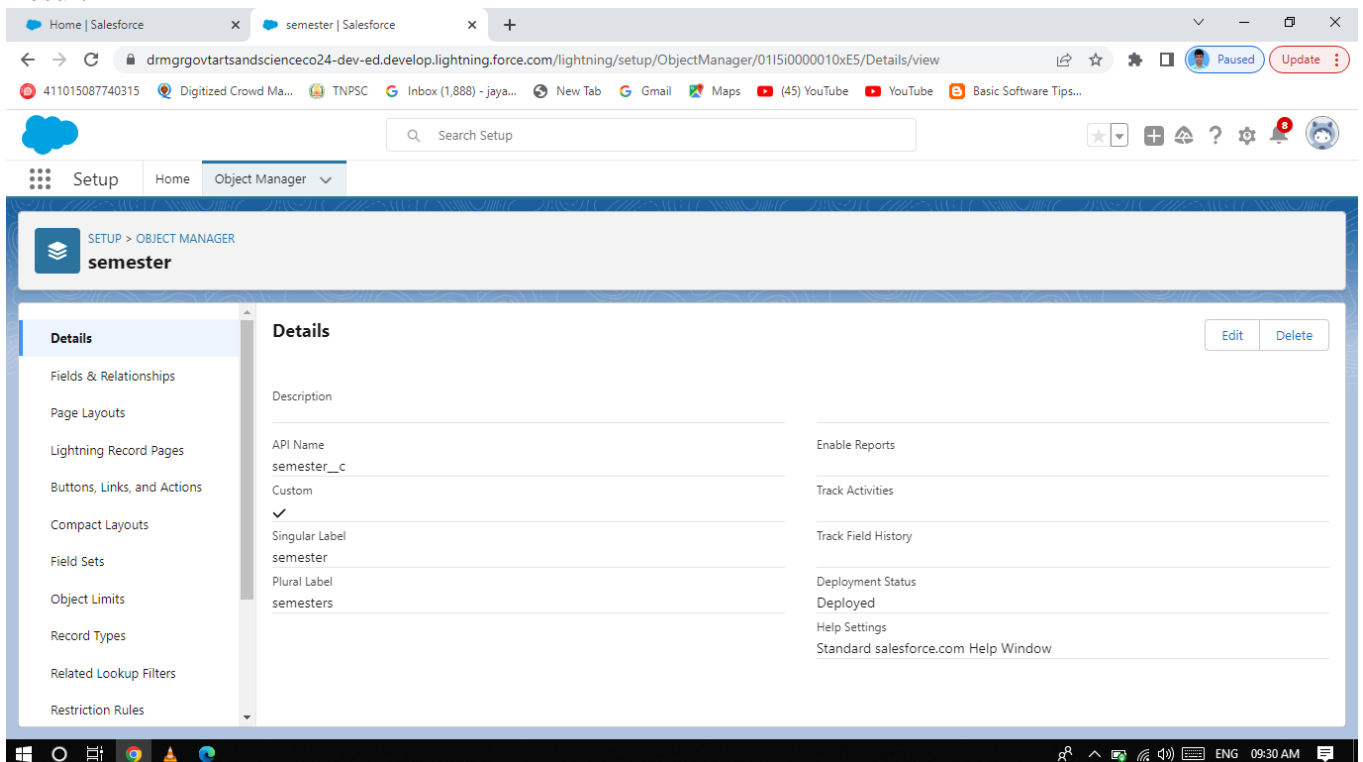
2.1 Empathy Map



2.2 Ideation & Brainstorming map screenshot



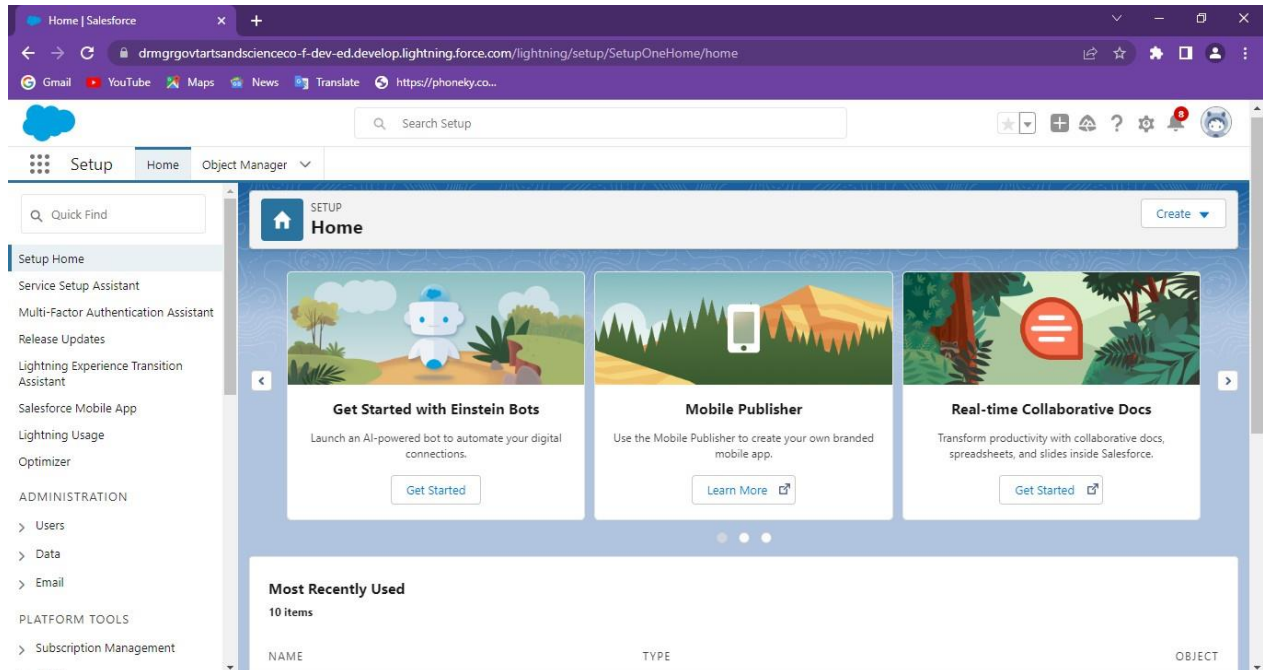
3. Result



3.1 Activity & Screenshot

Milestone-1: Creation of developer org

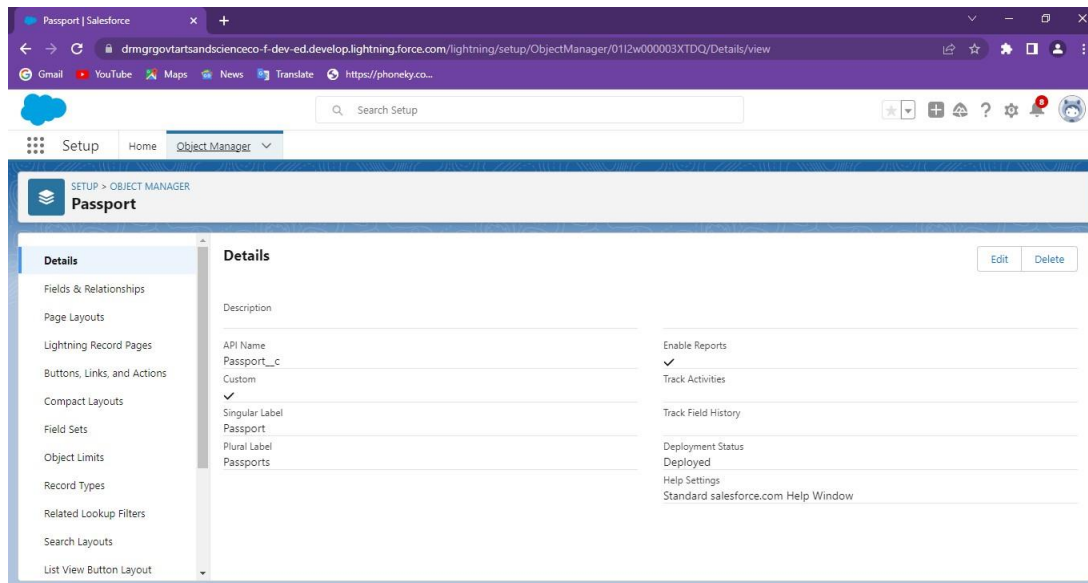
Activity-1: Creating Developer Account



Milestone-2: Objects:

Activity-1:

Creation of custom object:



Activity-2:

Fields available on custom object: Passport

Creation of fields on custom object: Passport

The screenshot shows the Salesforce Setup interface for a custom object named "Passport". The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled "Fields & Relationships" and shows a table of 5 items, sorted by Field Label. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact number	Contact_number__c	Number(10, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Passport Name	Name	Text(80)		✓

Milestone-3: Relationship B/w objects:

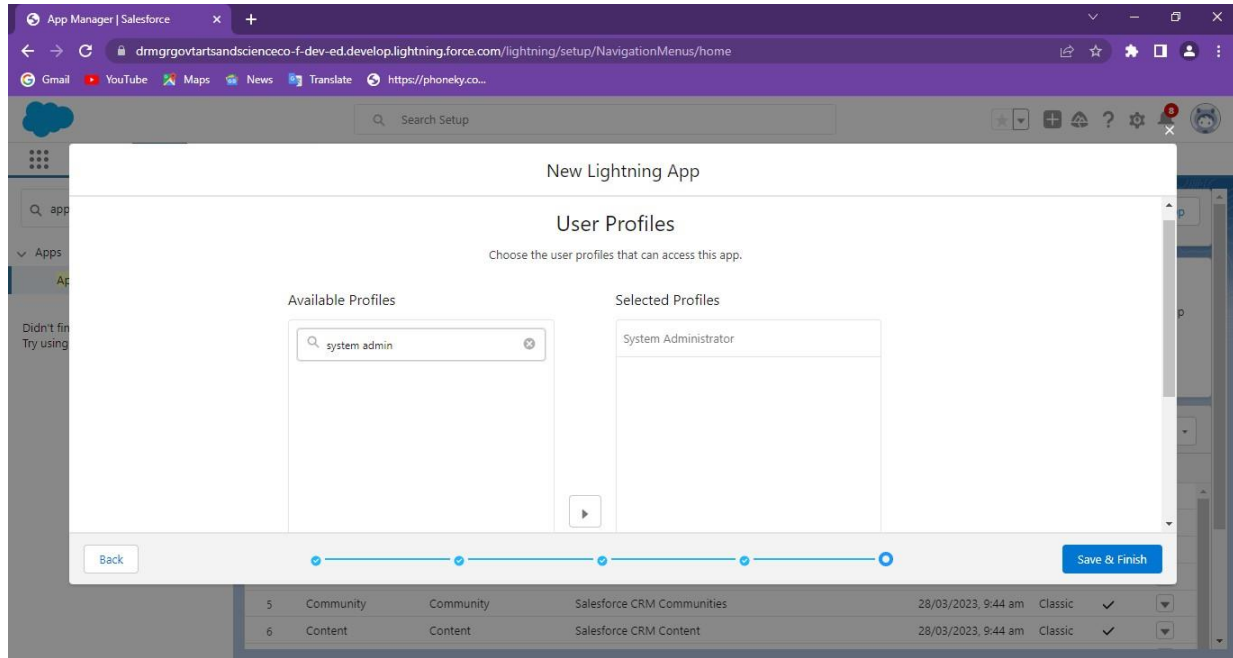
Activity-1: Creation of Relationship

The screenshot shows the Salesforce Setup interface for a custom object named "Visa slot". The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled "Master-Detail Relationship" and shows a list of relationship types with their descriptions.

- ☒ Master-Detail Relationship: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list. Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- ☐ External Lookup Relationship: Allows users to select a True (checked) or False (unchecked) value.
- ☐ Checkbox: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- ☐ Currency: Allows users to enter a date or pick a date from a popup calendar.
- ☐ Date: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- ☐ Date/Time: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- ☐ Email: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- ☐ Geolocation: Allows users to enter any number. Leading zeros are removed.
- ☐ Number: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- ☐ Percent: Allows users to enter any phone number. Automatically formats it as a phone number.
- ☐ Phone

Milestone-4 App:

Activity: Creation of App



App Manager | Salesforce

dmgrgovartsandsienceco-f-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app man

Apps

App Manager

Didn't find what you're looking for? Try using Global Search.

Lightning Experience App Manager

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#).

Enable App Cloning ☐ Disabled

22 items • Sorted by App Name • Filtered by All appmenutems - TabSet Type

	App Name	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		28/03/2023, 9:44 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	28/03/2023, 9:44 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	28/03/2023, 9:44 am	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your i...	28/03/2023, 9:47 am	Lightning	✓
5	book my visa	book_my_visa		29/03/2023, 10:07 am	Lightning	✓
6	Community	Community	Salesforce CRM Communities	28/03/2023, 9:44 am	Classic	✓
7	Content	Content	Salesforce CRM Content	28/03/2023, 9:44 am	Classic	✓
8	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manag...	28/03/2023, 9:44 am	Lightning	✓
9	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	28/03/2023, 9:44 am	Lightning	✓

Milestone-5 User:

Activity-1: Creation of User

Users | Salesforce

dmgrgovartsandsienceco-f-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w00000FZhVr%3FnoRedirect%3D1%26is...

Search Setup

Setup Home Object Manager

use

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Process Automation

Paused And Failed Flow Interviews

User Interface

SETUP Users

Language English

Delegated Approver

Manager

Receive Approval Request Emails Only if I am an approver

Federation ID

App Registration: One-Time Password Authenticator

App Registration: Salesforce Authenticator

Security Key (U2F or WebAuthn)

Lightning Login

Temporary Verification Code (Expires in 1 to 24 Hours) [Generate](#)

Receive User Registrations

Data.com User Type [i](#)

Accessibility Mode (Classic Only) [i](#)

Debug Mode [i](#)

High-Contrast Palette on Charts [i](#)

Load Lightning Pages While Scrolling [i](#)

Salesforce CRM Content User [i](#)

Receive Salesforce CRM Content Email Alerts [i](#)

Receive Salesforce CRM Content Alerts as Daily Digest [i](#)

Allow Forecasting [i](#)

Call Center

Phone

Extension

Fax

Mobile

Email Encoding Unicode (UTF-5)

Employee Number

Used Data Space 0 B [View](#)

Used File Space 0 B [View](#)

Last Login

Users | Salesforce

dmrggovtartsandscienceco-f-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUs...

Search Setup

Setup Home Object Manager

use

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Process Automation

Paused And Failed Flow Interviews

User Interface

SETUP Users

User Edit Save Save & New Cancel

General Information

First Name Divyakavitha

Last Name G

Alias

Email kavi88658@gmail.com

Username kavi88658@gmail.com

Nickname User1680064805499577411

Title

Company

Department

Division

Role <None Specified>

User License Salesforce Platform

Profile Standard Platform User

Active ☒

Marketing User ☐

Offline User ☐

Knowledge User ☐

Flow User ☐

Service Cloud User ☐

Site.com Contributor User ☐

Site.com Publisher User ☐

WDC User ☐

Data.com User Type --None--

Data.com Monthly Addition Limit Default Limit (300)

Accessibility Mode (Classic)

Activity-2:

OWD: organisation with default settings

Home | Salesforce college | Salesforce App Manager | Salesforce Users | Salesforce

dmrggovtartsandscienceco24-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%2...

411015087740315 Digitized Crowd Ma... TNPSG Inbox (1,888) - jaya... New Tab Gmail Maps (45) YouTube YouTube Basic Software Tips...

Search Setup

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for? Try using Global Search.

SETUP Users

New User

User Edit Save Save & New Cancel

General Information

First Name dhivya

Last Name bharathi

Alias dbhar

Email dhamayanthi19122002@gm

Username dhamayanthi19122002@gm

Nickname User1681964361882346335

Title

Company

Department

Division

Role <None Specified>

User License Salesforce

Profile Custom: Sales Profile

Active ☒

Marketing User ☐

Offline User ☐

Knowledge User ☐

Flow User ☐

Service Cloud User ☐

Site.com Contributor User ☐

Site.com Publisher User ☐

WDC User ☐

Help for this Page

ENG 09:46 AM

Milestone-6 Reports:

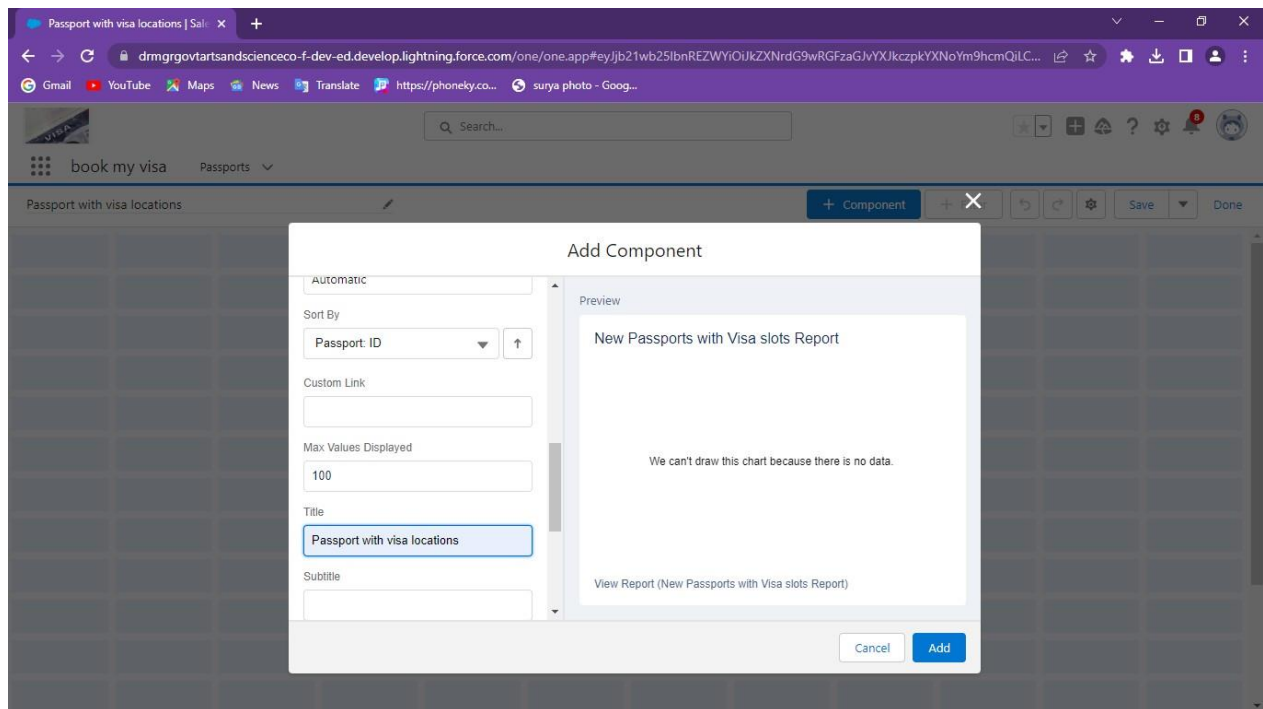
Activity-1: Creation of report

The screenshot shows the Salesforce Report Builder interface. The report is titled "New Passports with Visa slots Report" and is based on the "Passports with Visa slots" data source. The report is currently in "Outline" view, showing a table with columns for "Passport: ID", "Passport: Passport Name", and "Total". The report is currently empty, with a message stating "No records returned. Try editing report filters: • Show All passports. • Edit other filters in the filter panel." The interface includes a sidebar with "Groups" and "Columns" sections, and a top navigation bar with various Salesforce tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and More. The bottom of the interface shows a "To Do List" and a "Conditional Formatting" button.

Milestone-7 Dashboards:

Activity: Creation of Dashboard

The screenshot shows the Salesforce Dashboard Builder interface. A modal window titled "Add Component" is open, allowing the user to add a new component to the dashboard. The component is titled "New Passports with Visa slots Report" and is based on the "New Passports with Visa slots Repo" data source. The modal includes a "Display As" section with various chart types (Bar, Line, Pie, etc.) and a "Y-Axis" section with a dropdown menu. The "Preview" section shows a message: "We can't draw this chart because there is no data." The modal also includes a "View Report (New Passports with Visa slots Report)" button. The background shows a dashboard with a "book my visa" component and a "Passports" dropdown menu.



4. Trailhead profile public URL

Team lead-<https://trailblazer.me/id/devisri11>

Team Member1-<https://trailblazer.me/id/dhamayanthiv12>

Team Member2-<https://trailblazer.me/id/ddharanimaths>

Team Member3-<https://trailblazer.me/id/dhivyabharathi16>

5. ADVANTAGES & DISADVANTAGE

International travel is no longer a luxury restricted to families or businesses with deep pockets. A large percentage of travellers, irrespective of background, are increasingly keen to explore foreign destinations and embark on at least one overseas visit per year. With visa services offered for 58 countries worldwide, VFS Global prides itself on being a household name among avid travellers. Retention and churn rates are extremely important determiners for a company's success; customer churn is a major obstacle to business growth. CRM tools like sentiment analysis, automated ticketing, and customer support and customer service automation can dramatically improve your retention by letting human agents defuse problems. Analytics

tools that look at customer life cycle can show you when churn happens and why, so you can identify and address pain points.

6. APPLICATIONS

Application 1: Tracking Customers

A good CRM helps you understand your market and the needs of your customers. As you attract more customers, a CRM makes two things clear: who is interested in what you have to offer, and what is most important to them.

When it comes to winning more customers, a CRM helps you make smarter decisions than your competition and offer people what they truly want. And if customers leave or your sales stagnate, you can see common threads and change the process accordingly, to better meet their needs and retain them. When you're working in spreadsheets and scrolling through email chains, it's hard to get a big picture of all the important data about current and future customers. A CRM saves important data in extensive customer and contact lists.

This makes it easy and efficient to market directly to them based on particular criteria

Improving Interactions and Communications

When your list of customers is short, it's easy to keep up with everyone. However, as your business grows and that list becomes longer, it's more likely that sales opportunities and current customers may fall through the cracks.

Application 4: Streamlining Internal Sales Processes

Because every salesperson operates differently, things can get inefficient quickly!

A good CRM helps you streamline your internal sales processes so that there is consistency and quality across your sales team. This is the secret to how companies can promise, and consistently deliver, great customer service – having one place where all the customer information lives, and the Process to back it up.

7. CONCLUSION

A visa appointment means scheduling a date and time for the interview at US Embassy or Consulate. Student visa aspirants are called for an interview to make sure that all the information on their application is correct. In the USA visa interview, students are asked a few basic questions to find out if they are eligible for the visa they want.

Advance travel planning and early visa application are important. If you plan to apply for a nonimmigrant visa to come to the United States as a temporary visitor, please review the current wait time for an interview using the tool below. *Not all visa applications can be completed on the day of the interview; please read the information below for more details.*

VIDEO LINK-<https://photos.app.goo.gl/tAdtDpidYMTaumU46>

8. FUTURE SCOPE

Moreover, the companies didn't have the expertise to manage the CRM software inhouse. Hence, they were bound to hire designated technicians. These technicians used to charge a lump sum amount in exchange for their services. As a result, the cost used to be the most discouraging factor for small and medium enterprises. If we notice today's scenario, then the CRM software has become quite affordable. Even many developers are providing CRM software for free. Since most CRMs are web-based software, the up-gradation of infrastructure does not become necessary. Hence, it is a great way to save your expenses.

The CRM software gathers all customer-related information into a single place. Moreover, you can easily track customers across all platforms via the CRM system. Therefore, if you find any changes in their details or activities, then instantly update the same on your software. You can thereby minimize errors and save your time as well as effort for running your business.